



Energy Assistance and Solar Savings Initiative (EASSI)

Applicant Intake Form

Program Overview

Energy use in buildings represented nearly two-thirds of South Bend's greenhouse gas (GHG) emissions in 2019. Our City's Climate Action Plan therefore calls for expanding energy audits for buildings and increasing local incentives for energy efficiency. The City's Office of Sustainability, the mission-driven lender IFF, and CDFI Friendly South Bend have launched the Energy Assistance and Solar Savings (EASSI) pilot program in response to this call.

EASSI aims to help nonprofit and community institutions¹ access solar energy and improve their energy efficiency through subsidized energy assessments, City-sponsored grants², and low-interest loans from IFF³.

How it works

1. Your organization completes the **intake form**.
2. If approved for the program, your organization will receive a **free energy assessment** (conducted by IFF and fully subsidized by the City).
3. The City and IFF will review the assessment with you and support you in selecting **efficiency projects** to pursue.
4. Once you select the projects, you will submit an application for **low-interest loans** (financed by IFF) **and/or grants** (from the City of South Bend) to help cover the costs of the building efficiency improvements.*

Possible improvements supported through EASSI include:

- ☐ Solar panel installation
- ☐ HVAC replacement
- ☐ EnergyStar appliance upgrades (refrigerators, washers, dryers, etc.)
- ☐ Lighting upgrades
- ☐ Water heater upgrade
- ☐ Air/duct sealing
- ☐ Insulation/weatherization
- ☐ Window replacement

In 2022, the program will target up to 15 nonprofits and community institutions.

The location of the solar and/or energy efficiency investments must be within the South Bend city limits to qualify for this program.

¹ Eligible organizations include **nonprofits, schools, nonprofit early childhood centers, libraries, medical facilities, and grocery stores**.

² These grants are made possible through the City's American Rescue Plan funds. They do not have the same requirements as the City's CDBG funds. The grant amount may range from **\$2,500 - \$10,000** per organization and **will not exceed 50% of total project costs**.

³ The minimum loan amount which may be financed through IFF is **\$5,000**.

**Process Overview**

Participants will be placed into either the **Spring Cohort** or the **Fall Cohort**, based on their level of project readiness, interest in solar energy, and desired project timing.

Please see below for a tentative timeline for each cohort:

SPRING COHORT (3-5 organizations)	
January 28, 2022	Intake Form deadline for organizations interested in Spring Cohort
Late January/February 2022	Energy Assessments conducted on-site
Mid-March 2022	Review completed energy assessment & select projects ⁴
April/May 2022	Collect quotes, apply for grant and/or loans, & confirm financing for projects
June 2022 + onward	Building efficiency improvements & follow-up visit

FALL COHORT (5-10 organizations)	
June 3, 2022	Intake Form deadline for organizations interested in Fall Cohort
Late June/July 2022	Energy Assessments conducted on-site
Mid-August 2022	Review completed energy assessment & select projects
September 2022	Collect quotes, apply for grant and/or loans, & confirm financing for projects
October 2022 + onward	Building efficiency improvements & follow-up visit

Application Overview

- Interested applicants should submit this intake form -
 - By email** to sustainability@southbendin.gov or
 - By mail** to *Office of Sustainability, Department of Community Investment, City of South Bend, 227 W Jefferson St., 14th Floor South Bend, IN 46601.*

To join the Spring Cohort, please submit the form by **January 28, 2022**.

Intake forms will be reviewed on a rolling basis. We encourage those who are interested in the program to submit an intake form as soon as possible. The forms will be reviewed, and your organization will be placed into a cohort based on the following:

- Alignment between this program and the organization's mission
- The organization's level of project readiness
- The organization's interest in solar energy⁵, and

⁴ If your organization is interested in solar energy, the energy assessment will be completed in two parts: 1) solar feasibility analysis and 2) entire facility assessment and recommendations. The solar feasibility piece of the assessment will be shared with you as soon as possible to ensure you have the opportunity to install panels before Indiana's net metering policy changes on July 1, 2022.

⁵ Organizations that are interested in solar projects will be given priority for the Spring Cohort as the state's net metering policy changes on July 1, 2022.



- The organization's desired project timing.
2. The City will reach out to discuss the intake form. If approved, we will ask your organization to sign a letter of commitment, indicating your intention to complete an energy efficiency and/or solar project.
 3. Once the energy assessment is completed and projects have been selected, your organization will then submit a loan and/or grant application to IFF (1 application per organization).
 4. If approved, a loan and/or grant agreement will be executed by your organization and IFF.

Program Administrator Contact Information

- For more information about qualified solar and energy efficiency projects, contact the City's Office of Sustainability at sustainability@southbendin.gov or **574-235-9357**.
- For more information about eligibility, requirements, and IFF financing, contact Amandula Anderson at aanderson@iff.org or 317-860-6904.

Please note that completion of this intake form is not confirmation that your organization will receive a grant, nor is it the application form for a loan or a grant. Completing this form will help program administrators to determine eligibility and recommend next steps. Applications will be reviewed as they are received.

Contact Information

Organization Name: _____

Mailing Address: _____

Contact Name/Role: _____

Phone: _____ Email Address: _____

Eligibility Information

Select the organization's type:

- | | |
|---|---|
| <input type="checkbox"/> Nonprofit | <input type="checkbox"/> Grocery Store |
| <input type="checkbox"/> Library | <input type="checkbox"/> Medical Facility |
| <input type="checkbox"/> School or Early Childhood Center | <input type="checkbox"/> Place of Worship |
| | <input type="checkbox"/> Other: _____ |

Years your organization has been in operation: _____

How many facilities does your organization operate? _____

Who (if anyone) in your organization is dedicated to facilities management? _____

For which address(es) are you interested in receiving an energy assessment and doing a solar or energy efficiency project?

Address: _____	Age of facility: _____
Address: _____	Age of facility: _____
Address: _____	Age of facility: _____



Is(/are) your facility(ies) located in a historic district? ☐ Yes ☐ No

Do you own or lease the property? ☐ Own ☐ Lease

If you lease the property, what is the property owner's:

Name: _____

Phone number: _____

Email address: _____

Did the property owner grant permission for this project? ☐ Yes ☐ No

How long is your lease term? _____

Do you plan to renew your lease? ☐ Yes ☐ No

Energy Information

Who are your electricity and/or gas providers? _____

What is your average monthly electric bill? _____ What is your average monthly gas bill? _____

Have you completed an energy audit in the last five years? (Please attach, if yes) ☐ Yes ☐ No

Do you have an Energy Star Portfolio Manager account? ☐ Yes ☐ No

Has your organization participated in Indiana Michigan Power or NIPSCO energy efficiency rebate programs?

☐ Yes ☐ No

If yes, which rebates did you receive? _____

If known - what kind of space heating and cooling system(s) is(/are) used in your facility? _____

Project Information

How did you hear about this program? _____

How does this program align with your organization's mission? _____



Based on your current knowledge of your facility (pre-energy assessment), what type of project(s) is your organization interested in funding through this loan and grant program? *Select all that apply.*

- ☐ Solar panel installation
- ☐ HVAC replacement
- ☐ EnergyStar appliance upgrades (refrigerators, washers, dryers, etc.)
- ☐ Lighting upgrades
- ☐ Water heater upgrade
- ☐ Air/duct sealing
- ☐ Insulation/weatherization
- ☐ Window replacement
- ☐ Other: _____

Please note that this program will require investment from your organization (equity or debt). By submitting this intake form, you are acknowledging that your organization is financially positioned to take on the portion of the total project(s) cost that will not be covered by the City-sponsored grant.

What is your preferred timing for completing the project?

- ☐ Spring Cohort 2022 ☐ Fall Cohort 2022 ☐ Either will work well ☐ Other: _____

Additional information needed:

Please note this additional information that your organization will need to provide in the loan application. If your organization is unable to provide some of this information, let us know and we can discuss whether there are alternative documents which may be supplied to verify financial eligibility. Applicants must demonstrate that their organization has been in operation for a minimum of three years to qualify for participation. This is not an exhaustive list of the information which will need to be provided in the loan application.

- EIN
- 501c3 determination letter (if applicable)
- List of board of directors and a short biography for the top 3-4 board members
- Articles of Incorporation
- Three years of audits or 990 tax returns
- Three years of financial statements
- Interim financial information
- Funding sources which have been identified for this project